

Training Package	Business Services (BSB07)	HSC Requirements and Advice
Unit code	Unit title	HSC Indicative Hours
BSBADM307B	Organise schedules	15

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage appointments and diaries for personnel within an organisation, using manual and electronic diaries, schedules and other appointment systems. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.
Competency field	Administration – General Administration
Application of the unit	This unit applies to individuals employed in a range of work environments who provide administrative support to teams and individuals in the management of diaries, schedules and other appointment mechanisms.
Employability skills	This unit contains employability skills.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Context of and specific resources for assessment	Method of assessment	Gather information for assessment
Evidence of the following is <u>essential</u> : <ul style="list-style-type: none"> maintaining schedules which meet individual and organisational needs prioritising and negotiating competing demands. 	Assessment <u>must</u> ensure: <ul style="list-style-type: none"> access to an actual workplace or simulated environment access to office equipment and resources access to a range of diaries, planners and calendars to record and schedule appointments. 	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: <ul style="list-style-type: none"> direct questioning combined with review of portfolios of evidence and third party workplace reports of on the job performance by the candidate review of authenticated documents from the workplace or training environment analysis of responses to case studies and scenarios demonstration of techniques in a workplace or simulated environment review of testimony from team members, colleagues, supervisors or managers. 	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: <ul style="list-style-type: none"> other general administration units.

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to discuss and confirm requirements and priorities of others and to question others to clarify information
- literacy skills to read a range of procedural texts and to write simple instructions
- negotiation skills to schedule appointments where there are competing demands
- numeracy skills to estimate time, plan accurately and keep records
- problem solving skills to negotiate task distribution and timing for appointments with other members of the group
- time management skills to allow realistic time lines to schedule appointments.

Required knowledge

- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
 - anti discrimination legislation
 - ethical principles
 - codes of practice
 - privacy laws
 - occupational health and safety (OHS)
- relationship between satisfactorily organising another person's schedule and achieving team goals
- responsibility that is involved in making arrangements for others.

Element	Performance Criteria	Range Statement
1 Establish schedule requirements	1.1 Identify <i>organisational requirements</i> and protocols for diaries and staff <i>planning tools</i>	<p>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <i>Bold italicised</i> wording, if used in the performance criteria, is detailed below.</p> <p>Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.</p> <p><i>Organisational requirements</i> may include:</p> <ul style="list-style-type: none"> • availability of information • electronic linked diaries and schedules • linking personal and executive diaries • priority clients and personnel • protocols in contacting other personnel within and outside organisation • recording systems. <p><i>Planning tools</i> may include:</p> <ul style="list-style-type: none"> • appointment book • appointment view and planner view in electronic scheduling systems • calendar • desk diary • electronic calendar or diary • in/out boards and whiteboards • manual planners • planning wall chart.
	1.2 Identify organisational procedures for different types of appointments.	
	1.3 Determine personal requirements for <i>diary and schedule items</i> for individual personnel.	<p><i>Diary and schedule items</i> may include:</p> <ul style="list-style-type: none"> • conferences • deadlines • leave (for both immediate person and others whose absence affects the person) • meetings • recurring appointments • teleconferences • travel.
	1.4 Establish appointment priorities and clarify in discussion with individual personnel.	

Element	Performance Criteria	Range Statement
2 Manage schedules	2.1 Identify <i>recurring appointments</i> and deadlines, and schedule these in accordance with individual and organisational requirements.	<p><i>Recurring appointments</i> may include:</p> <ul style="list-style-type: none"> • board meetings • committee meetings • staff meetings.
	2.2 Establish availability of attendees, and schedule new appointments in accordance with required time lines and diary commitments.	
	2.3 Negotiate <i>alternative arrangements</i> and confirm when established appointments are changed.	<p><i>Alternative arrangements</i> may include:</p> <ul style="list-style-type: none"> • cancelling pre arranged appointments • inserting additional appointments after a schedule has been prepared • re scheduling existing appointments.
	2.4 <i>Record appointments</i> and manage schedules in accordance with <i>organisational policy and procedures</i> .	<p><i>Appointments</i> may be recorded in:</p> <ul style="list-style-type: none"> • calendar • diary • electronic system • filing system • paper system. <p><i>Organisational policy and procedures</i> may include:</p> <ul style="list-style-type: none"> • adequate time between appointments • leave • limit on total appointments in any one day • lunch breaks • OHS issues • stress minimisation • sufficient time to complete projects and to meet deadlines • time off in lieu.